Guide

for Charter School Planning and Results Reporting

March 2002

Alberta
LEARNING

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ISSN 1703 - 0218

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103-01841/

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What's Changed?

• Charter schools' obligation to share effective practices and results with the basic education system has been clarified and expanded.	Pages 1, 8, 9, 10
• References to the School Act revisions in 2001 that affect charter schools have been incorporated.	Pages 3, 11
• Provincially funded initiatives, including AISI, are now recognized as school authority strategies, with accomplishments reported in the AERR Highlights. Reporting on related plans is no longer a separate section.	Pages 7, 9
• Provincial Goal 5 - Responsible and Responsive Charter School – is being phased in as a required goal for school authority plans.	Link 2, page 11
• A new priority for improvement has been added - Improving Early Literacy and Numeracy.	Link 3, page 12
• The priority on technology has been re-framed to focus on instructional use and student outcomes - Improving Learning through Effective Use of Information and Communication Technology.	Link 3, page 12
• Targets for achievement tests are now mandatory for each year of the school authority three-year plans (one, two and three-year targets). Targets for diploma exams are optional for the 2002/03 – 2004/05 plan.	Link 4, pages 13
• Reporting in the AERR is not being implemented this year for achievement of students absent from grades 3, 6 and 9 provincial achievement tests.	

I. Introduction

This guide has been developed to assist Alberta's charter school authorities in preparing, updating and reporting on their three-year education plans.

In this guide general information on planning and reporting is separated from specific requirements for charter school education plans for 2002/03 to 2004/05 (due May 31, 2002) and Annual Education Results Reports (due November 30, 2003). The general information is provided in Sections I to IV. Specific provincial requirements are provided in the links in Section V. These are reviewed each year. Related reference materials are in the Appendices, Section VI.

While the guide is intended for charter schools in Alberta, it can be used by any organization that seeks to plan its goals, measure its progress, make improvements and communicate its achievements, as it is based on good planning and reporting principles.

II. Planning and Reporting Overview

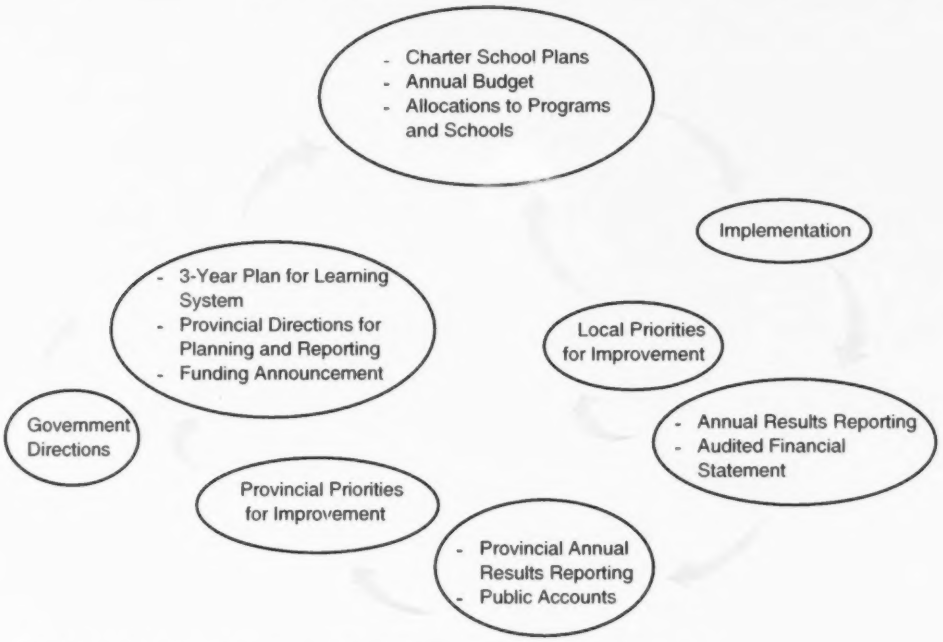
Charter schools have a unique purpose in Alberta's public education system: to provide different and innovative approaches for improving student learning not only for the benefit of their own students but also for use in other public schools over the long term.

Planning and reporting by charter schools throughout Alberta are carried out within government's Accountability Framework. This framework is an ongoing cycle that enables continuous improvement and critical reflection by:

- setting priorities, measuring progress and using results to continually improve education for students;
- incorporating provincial direction and community input; and
- communicating with stakeholders (provincial government, staff, school councils, parents, the public and Alberta's public education system) about charter school plans, new effective practices and results.

Key stakeholders and the public are the primary audience for the plans and reports. These documents become most effective as instruments of accountability and continuous improvement when they are used as a focus of communication with key stakeholders such as staff, students, parents, and the broader community.

Accountability Cycle for Continuous Improvement - Basic Learning System


- Charter School Plans
- Annual Budget
- Allocations to Programs and Schools
Implementation
- 3-Year Plan for Learning System
- Provincial Directions for Planning and Reporting
- Funding Announcement
Local Priorities for Improvement
Government Directions
- Annual Results Reporting
- Audited Financial Statement
Provincial Priorities for Improvement
- Provincial Annual Results Reporting
- Public Accounts

Each level in the Accountability Framework plays a key role.

Government of Alberta – sets overall provincial direction and allocates funding to ministries; monitors and reports on progress, and uses results to plan improvements.

Alberta Learning – prepares the Ministry three-year business plan and guidelines for school authority and post-secondary institution plans based on provincial direction, reports annually on results and uses results to plan improvements, identifies provincial priorities for improvement, allocates funds to school authorities and post-secondary institutions, defines basic education, reviews school authority and post-secondary plans and results to identify implications for provincial level planning.

Charter School Authorities – plan and implement three-year education plans aligned with Ministry direction and school authority focus and purpose; allocate resources to programs; monitor progress; report annually to stakeholders and use results to plan improvements.

References:

- Legislative Authority, Appendix 1
- Definition of Basic Education, Appendix 2
- Alberta Learning's Three-Year Business Plan for 2002/03 to 2004/05.

III. Charter School Planning

Charter school authority education plans focus on student learning over a three-year time horizon. Plans are updated annually so that as one year is completed and another is added, the plan continues to roll forward, maintaining a three-year timeframe. This allows the school authority to respond to recent performance results and changes in the operating environment while maintaining continuity from year to year.

Although entirely new plans are rarely prepared, charter school authorities update some components of their plan on an annual basis, such as strategies and priorities. Every few years, other components such as the vision, mission and beliefs should be revisited and refreshed. In particular, the revisions to the *School Act* in enacted by the Legislature in fall, 2001 provide charter schools the opportunity to ensure their charters and all elements of their education plans for 2002/03 to 2004/05 are aligned with provincial legislation and goals. Additional information on the *School Act* provisions and revised regulations for charter schools will be provided on Alberta Learning's website as it becomes available at: http://www.learning.gov.ab.ca/educationsystem/choices.asp.

Preparing and Updating Plans

Charter school authorities annually update the three-year education plan for their school based on the principle of continuous improvement, focusing on improving student learning. This annual update takes into account a number of considerations, including:

- the charter school results;
- input from stakeholders such as school councils, parents and the public;
- resources available;
- Alberta Learning three-year plan and annual results;
- feedback from Alberta Learning or other monitoring authorities if applicable; and
- recommendations arising from charter renewal.

Charter school three-year education plans build on Alberta Learning's vision, mission and goals for lifelong learning. Charter school authorities adapt goals and outcomes **required** by the province and incorporate charter mandate goals and outcomes to reflect their unique purpose, characteristics and circumstances.

Communication

Charter school three-year plans serve as a valuable tool for communicating with staff, school councils, parents and community groups. Charter school authorities have an obligation and use a variety of means to inform parents and the public of their goals, plans, results and priorities for improving education for students, and for the use of resources.

Publication and Notification Requirements for Charter Schools, Link 1

Alberta Learning staff review charter school plans and annual results reports to ensure alignment with legislation, provincial goals, their charter mandate and to provide input into provincial-level planning for the learning system.

Elements of Education Plans

Each charter school's three-year education plan is built on a three-year timeframe. Listed below are the elements typically found in a good plan. Some of these elements are **required** by Alberta Learning as noted.

Foundation statements, such as vision, mission, principles, and/or beliefs articulate the charter school's purpose. Contextual information, such as a school profile and issues and trends affecting operations, describe the planning environment. Alberta Learning **requires** charter school education plans to include charter and provincial goals and related measurable outcomes, performance measures, local targets and strategies, and to address provincial priorities for improvement. As well, budget highlights are **required** to be included in the plan.

These elements of education planning, taken together, combine to form a three-year plan that enables the charter school and stakeholders to know where the charter school is going, how it plans to get there, how it will measure progress and what resources it will use along the way. The plan acknowledges the charter school's role in Alberta's learning system, adapted to the context of the charter school. Required elements are labeled.

Foundation Statements

These elements of a plan succinctly present the charter school's aims and values.

Vision (required if new charter or first plan after charter renewal)

A vision looks to the future. It describes a set of ideal circumstances that charter schools strive to achieve. These ideals focus on student achievements and the programs or services that maximize student accomplishments.

Alberta Learning's vision for the provincial learning system - Optimizing human potential.

Mission (required if new charter or first plan after charter renewal)

A mission statement is a clear, concise description of the charter school's overall purpose and role. It gives direction to the programs and services that the school provides for its students. A charter school's mission is consistent with Alberta Learning's mission:

> Alberta Learning's leadership and work with partners builds a globally recognized lifelong learning community that enables Albertans to be responsible, caring, creative, self-reliant and contributing members of a knowledge-based and prosperous society.

Principles and/or Beliefs (required if new charter or first plan after charter renewal)

Alberta Learning has established principles for the learning system: learner-centred, accessible, collaborative, accountable, responsive, innovative and equitable. These would be reflected in the charter school board's statements as well as their own organizational beliefs. The charter board's principles or belief statements guide decision-making and provide a foundation for developing its mission, vision and goals.

Contextual Information

This information succinctly describes the charter school's context and operating environment.

Profile (required if new charter or first plan after charter renewal)

A profile is a brief description of the charter school that gives context for the plan. Profiles describe characteristics of the community, students, program and location.

Issues and Trends (required if new charter or first plan after charter renewal)

Issues and trends help charter schools identify opportunities and challenges that may impact planning, budgeting, providing programs and achieving results. An issue is a condition that may affect the charter board's ability to fulfill its mandate or to achieve its goals. A trend shows a direction of results over time.

Goals, Outcomes, Priorities, Measures and Targets

These elements of the three-year education plan are aligned with provincial goals, outcomes, measures and priorities, as well as address the charter school's purpose and circumstances.

Goals [required]

Goals are broad statements that look towards the long term and steer organizations in the direction of realizing their vision. They are often expressed as desired conditions or aims. Charter school goals are **required** to reflect Alberta Learning's goals that guide the direction of the learning system overall as well as address school purposes, needs and circumstances. Charter school authorities **must** include the primary goal(s) and measurable outcomes related to the particular teaching philosophy, vision and purpose on which their charter is based.

Outcomes [required]

Outcomes are measurable statements of what charter schools seek to achieve. In broad terms, they answer the question: "What will this look like when we get to where we want to be?" Plans include the **required** provincial outcomes and local outcomes for provincial and local goals. The outcomes reflect the charter school's purpose as well as improved results for students. Each goal **requires** at least one measurable outcome.

Required Goals and Outcomes for Charter School Plans, Link 2

Priority Areas for Improvement [required]

Priority areas for improvement reflect school and province-wide priorities that require immediate, concerted attention. Reviewing annual performance results is an important basis for selecting priorities in areas where results do not meet expectations. Selecting and addressing priorities for improvement are essential aspects of the accountability cycle for continuous improvement in Alberta's basic learning system. Charter schools are **required** to address provincial priorities for improvement.

Required Provincial Priorities for Improvement, Link 3

Performance Measures and Targets [required]

Performance measures are the assessment tools that charter school authorities use to track how far along they are in achieving the outcomes in their plan. Three-year education plans include at least one measure for each outcome; conversely, one measure can address more than one outcome. Measures are quantitative and are expressed as "numbers of" (in relation to a total) or "percentages of".

Charter school authorities list in their three-year education plans the measures they will use to assess and report their results, as well as past results for these measures, if available. These measures include the **required** provincial measures, locally-determined measures for provincial and charter school priorities for improvement, and any other local measures. The provincial measures for the provincial priorities for improvement are provided in Appendix 3 for reference. **Required** measures are labeled.

Provincial Measures and Results for Priority Areas for Improvement, Appendix 3

Targets are strategic tools to help charter school authorities focus on maintaining or improving results. Targets show desired levels of performance to be attained by a certain time. Targets are **required** for the provincial student achievement measures for each year of the plan and for measures related to the charter school's mandate, goals and outcomes.

Required Performance Measures and Targets, Link 4

References

Performance Measurement, Appendix 4

Setting Local Targets for Student Achievement, Appendix 5

Conducting Surveys, Appendix 6

Strategies [required]

Strategies are actions that charter schools implement to achieve goals and desired outcomes. Charter school boards are **required** to develop strategies for each goal to achieve outcomes and to address provincial and school priorities for improvement. The strategies also reflect the implementation of provincial initiatives funded by the Ministry such as Early Literacy, English as a Second Language, Student Health, Alberta Initiative for School Improvement (AISI), technology, Native Education projects, and students with special needs (if applicable). In addition, strategies address school issues and opportunities.

Budget Highlights [required]

Budget highlights present summarized information from the charter school authority's budget for the first year of the three-year plan in easy-to-understand terms for parents and the public. These highlights indicate how the budget supports the plan and how the school authority allocates resources, e.g., administration, instruction, operations and maintenance. Charter school authorities also include information on how detailed budget information can be obtained.

Requirements for Budget Highlights, Link 5

IV. Results Reporting

Charter school authorities report annually on the school's progress and achievements and use the information to identify improvements to address in the next update of their plan. Every few years charter school authorities may wish to undertake a major retrospective by assessing accomplishments and results over a longer span of time, e.g., approaching the end of the term of the charter or in preparation for applying to renew their charter.

Charter School Authority Results Reporting

Each year charter school authorities report on the progress of their three-year education plans through an Annual Education Results Report (AERR). The results are the primary tool that charter school authorities use to continually improve education for their students. The results provide information on areas where performance is strong and identify areas that need improvement. In short, it allows charter school authorities to practice results-based decision-making.

The annual results report also tells stakeholders where the charter school authority is in relation to where it wants to be. It demonstrates that the charter school authority is accountable for student achievement and for the wise use of resources to provide quality programs for students and to address improvement priorities.

Communication

AERRs provide charter school authorities the opportunity to highlight their accomplishments in addition to including the **required** reporting and analysis of performance measures.

AERRs are public documents. In keeping with their unique role in Alberta's learning system to implement innovative approaches to student learning that can be used to improve education for students throughout the province, charter school authorities are **required** to share their effective practices and results with school jurisdictions and the Ministry of Learning. Charter school authorities communicate results to parents, the public education system and the larger community through a variety of methods such as newspaper inserts, brochures, community meetings, etc.

Publication and notification requirements, Link 1

Alberta Learning staff review charter school authority AERRs to ensure alignment with provincial goals and to provide input into provincial-level planning for the learning system.

Elements of Annual Education Results Reports

The Annual Education Results Report (AERR) provides information on the charter school authority's major activities and achievements of the past year, with a focus on results for students. Listed below are the elements typically found in a charter school results report. Those elements required by Alberta Learning are labeled.

Highlights of Education Plan Accomplishments
This information highlights the charter school authority's progress and accomplishments in implementing the three-year education plan, including achievements related to implementation of provincially funded initiatives such as Early Literacy, English as a Second Language, Student Health, AISI, technology, Native Education projects, and programs for children with special needs (if applicable).

Charter school authorities are **required** to report AISI project summaries, which could be included with the presentation of their other accomplishments. (See *AISI Administrative Handbook*, pages 28 and 31.) Charter school authorities are **required** to implement innovative approaches to improve student learning and to inform the public education system of their effective practices and results. The implementation and communication of these innovations could also be included in the presentation of accomplishments.

Performance Measures Results [required]

Charter school authorities provide results information for the performance measures in the school three-year plan for the **required** student achievement measures and local measures, including those selected to assess charter goals and provincial priorities for improvement.

Charter school authorities use the results to analyze and assess their progress. Contextual information can be provided to explain results and describe the environment in which results were achieved. This qualitative information enhances understanding of quantitative results and contributes to the overall assessment of progress and achievement.

Required measures for reporting on student achievement, Link 6

Provincial results for measures related to the provincial priorities for improvement are provided in Appendix 3 for reference. If charter schools use corresponding local measures, they can report their performance in relation to the provincial results. The **required** measures are labeled.

Provincial results for priorities for improvement, Appendix 3

Future Challenges [required]

Charter school authorities outline their major issues, concerns and priorities for the charter school for the next few years, including priorities for improvement identified from the assessment of results. This section also discusses emerging issues and trends that have implications for the charter school.

Financial Summary [required]

In the financial summary, charter school authorities provide a brief overview of their spending for the previous year based on the Audited Financial Statement (AFS). This information is presented clearly and concisely in a table or graph format for the primary audience - parents and other members of the community. Charter school authorities also indicate how readers can access detailed expenditure information.

Requirements for Financial Summary, Link 7

V. Links

The links list specific requirements for charter school authority three-year education plans and Annual Education Results Reports (AERRs).

Link 1
Publication and Notification Requirements

Three-year education plans and Annual Education Results Reports are **required** to be made available to the public. Charter school authorities are encouraged to use a variety of methods to communicate their plans and their achievements to the broader community.

Education Plans

Three-year plans are **required** to be updated by **May 31** of each year. Charter school authorities provide a copy of their plan as an e-mail attachment to the appropriate zone liaison education manager. The plan is posted on the charter school board website (if applicable).

Results Reports

The Annual Education Results Report (AERR) is **required** to be prepared by **November 30** of each year. Also, charter school authorities provide a copy of their AERR as an e-mail attachment to the appropriate liaison education manager and post it on their website (if applicable). In keeping with their unique role in Alberta's public education system to implement innovative approaches to improve student learning, charter school authorities are **required** to communicate their effective practices and results to school jurisdictions as well as to Alberta Learning.

Link 2

Required Goals and Outcomes for Charter School Plans, 2002/03 to 2004/05

Listed below are the learning system goals and outcomes that are **required** to be incorporated in school authority three-year education plans. The learning system outcomes, which apply across the entire learning system may be interpreted, and adapted, by charter school authorities to reflect their ECS-12 mandate, their charter as well as school needs and circumstances. For example, the applicable charter school outcome statement for "learners complete programs" could be restated as "students are prepared to be successful in the next grade". The provincial goals and outcomes are reviewed annually in the Ministry's business planning process.

Goals	Learning System Outcomes
Primary Charter School Goals: Reflect the particular teaching philosophy, vision and purpose outlined in the charter that focus on improving student learning outcomes.	Outcome(s) for charter school's unique goals • One or more measurable outcomes related to each charter goal and to improved student learning as outlined in Section 35 (a) and (b) of the School Act, RSA 2000.
Goal 1: High Quality Learning Opportunities*	• The learning system is responsive - the learning system meets the needs of all learners and society. • The learning system is flexible and provides a variety of programs and modes of delivery. • The learning system is accessible - all Alberta students can participate in learning. • Financial need is not a barrier to learners participating in learning opportunities. • The learning system is affordable.
Goal 2: Excellence in Learner Achievement	• Learners demonstrate high standards. • Learners complete programs.
Goal 3: Well Prepared Learners for Lifelong Learning, World of Work and Citizenship	• Children start school ready to learn. • Albertans are able to learn continuously in school, at work and in society. • Learners are well prepared for work. • Learners are well prepared for citizenship.
Goal 4: Effective Working Relationships with Partners	• Effective partnerships meet the learning needs of Albertans. • Joint initiatives contribute to the social and economic goals** of the province.
Goal 5: Responsible and Responsive Charter School Authority **(New-optional for 2002-05 three-year plan and required for the 2003-06 plan)**	• The charter school authority demonstrates leadership and continuous improvement in administrative and business processes and practices. **(See Appendix 7 for a listing of sample measures for this outcome.)**

* Charter schools may choose to add to this goal an outcome and corresponding measure(s) and strategy(ies) relating to high quality teaching.

* * Selected Social Goals: Our children will be well cared for, safe, successful at learning and healthy; Alberta students will excel.

* * Selected Economic Goals: Alberta will have a prosperous economy; Our workforce will be skilled and productive; Alberta businesses will be increasingly innovative.

Link 3
Required Provincial Priorities for Improvement for Charter School Plans, 2002/03 to 2004/05

Priorities for improvement are important outcomes where performance does not meet expectations. Charter school authorities are **required** to develop strategies in their three-year plans to address provincial and local priorities for improvement based on their results and to report results related to the priorities in their Annual Education Results Reports.

Listed below are the **required** provincial priorities for improvement for the basic learning system related to provincial goals and outcomes. Improving early literacy and numeracy has been added as a new priority for improvement for charter schools, reflecting the high priority government places on these skills. The information technology priority has been re-framed to focus on instructional use and student outcomes. The other priorities continue from earlier years, and have been presented in an order reflecting progression through school. See Appendix 3 for **required** measures for the early literacy and numeracy and the secondary mathematics priorities.

Priority Areas for Improvement and Related Goals

- **Improving early literacy and numeracy (new)**

  Related to Goal 2 – Excellence in Learner Achievement

- **Improving coordination of services for children**

  Related to Goal One - High Quality Learning Opportunities
  Related to Goal Four - Effective Working Relationships

- **Improving learning through effective use of information and communication technology (new focus).**

  Related to Goal One – High Quality Learning Opportunities

  Related to Goal Three – Well Prepared Learners for Lifelong Learning, World of Work and Citizenship

- **Improving secondary student achievement in mathematics**

  Related to Goal Two - Excellence in Learner Achievement

- **Increasing high school completion rates**

  Related to Goal Two - Excellence in Learner Achievement

- **Improving community satisfaction with education**

  Related to all Goals

Link 4
Required Performance Measures and Targets for Charter School Plans, 2002/03 to 2004/05

The specific student achievement performance measures and targets listed below are **required** to be included in charter school authority three-year plans along with results for the past five years, if available.

Required measures for the outcome: Learners demonstrate high standards in Goal 2 - Excellence in Learner Achievement.

1. Percentages of students (excluding those in home education programs) who achieved the acceptable standard and the percentages who achieved the standard of excellence on provincial achievement tests in Grades 3, 6 and 9 (five years of results) based on those writing in relation to provincial results and provincial standards*.

   Include targets for each year of the plan (i.e. targets for 2002/03, 2003/04 and 2004/05). **(new)**

2. Participation rates: percentages of students in grades 3, 6 and 9 who wrote provincial achievement tests.

3. Percentages of students who achieved the acceptable standard and percentages who achieved the standard of excellence on diploma examinations (five years of results) in relation to provincial standards* and provincial results. 2003 is the first year to report Applied Mathematics 30 results.

   *Provincial standards: 85% of students writing are expected to achieve the acceptable and 15% are expected to achieve the standard of excellence.

4. Student participation in diploma exam courses.

   Note: for the measures listed above, the Learner Assessment Branch provides multi-year reports on student results and participation. Charter schools include this information in their plans and use it for setting targets and for developing strategies to improve programs for students and achieve targets.

Link 5
Requirements for Budget Highlights, 2002/03

Budget highlights present summarized information from the charter school authority's budget for the first year of the three-year education plan in easy-to-understand terms for parents and the public.

These highlights include information on:

- how the budget supports the plan
- how the authority allocates resources to its program areas, and
- how readers can obtain detailed budget information from the authority.

This information should be presented clearly and concisely in a table or graph format for the primary audience - parents and other members of the school community.

These requirements are the same for 2002 and 2003.

Link 6
Required Charter School Performance Measures for November 2003 AERR

Listed below are the **required** provincial performance measures to be reported in charter school authority Annual Education Results Reports, November 2003. These measures provide information related to the outcome "students achieve high standards" for the goal Excellence in Learner Achievement in the charter school's three-year plan for 2002/03 to 2004/05.

1. Percentages of students (excluding those in home education programs) who achieved the acceptable standard and percentages of students who achieved the standard of excellence on provincial achievement tests in grades 3, 6 and 9 (five years of results) based on those writing in relation to charter school targets for each year, provincial results and provincial standards*.

2. Participation rates: percentages of students in grades 3, 6 and 9 who wrote provincial achievement tests.

3. Percentages of students who achieved the acceptable standard and percentages who achieved the standard of excellence on diploma examinations (five years of results) in relation to provincial results and provincial standards*. 2003 is the first year for reporting Applied Mathematics 30 results.

   *Provincial standards: 85% of students writing are expected to achieve the acceptable standard and 15% are expected to achieve the standard of excellence.

4. Student participation in diploma examination courses.

   Note: For the measures listed above, the Learner Assessment Branch provides charter school authorities with multi-year reports on student results and participation. Charter schools use this information to report on the above measures.

   See the 2001 edition of the Guide for Charter School Planning and Results Reporting for the required measures for the November 2002 AERR.

Link 7
Requirements for the Financial Summary, November 2003

The financial summary is **required** to provide a brief overview of charter school authority expenditures for the previous year based on Schedule A of the Audited Financial Statement (AFS), including:

- expenses per student per year overall,
- expenses per student by program area, and
- how readers can access detailed expenditure information (the AFS) from the charter school authority.

This information should be presented clearly and concisely in a table or graph format for the primary audience - parents and other members of the school community.

These requirements are the same for 2002 and 2003.

VI. Appendix 1
Legislative Authority

The provincial government has developed a comprehensive concept of accountability that expanded the focus from accounting for dollars spent to include accounting for results achieved. Accountability for performance involves developing plans to make best use of resources available, assessing results to determine if expectations are being met, identifying and addressing areas where improvement is needed, and reporting the results to the public.

This expanded concept of accountability, applying to government departments and funded agencies and organizations, was established in legislation in 1995. The *Government Accountability Act* (GAA) requires government departments and school authorities as well as other public agencies to prepare plans and report on results.

The accountability cycle for the basic learning system (*Accountability in Education – Policy Framework*, June 1995) was developed to describe the application of government's comprehensive concept of accountability to the ECS-12 system. This cycle focuses on continuous improvement and on the linkage of school authority plans and reports to each other and to provincial directions for the learning system, as reflected in the School Authority Accountability Policy, 2.1.1 (*Policy, Regulations and Forms Manual*, on-line at www.learning.gov.ab.ca).

A variety of documents essential for school system operations are available on the department's website, such as the three-year business plan for the learning system, the Guide to Education, the Program of Studies and the Funding Manual for School Authorities. The *Government Accountability Act* and the *School Act* are available on the Queen's Printer website linked from the on-line Policy Manual Table of Contents, or at www.gov.ab.ca/qp/

Alberta Learning's website also provides information to enhance school authority planning and reporting, such as the provincial surveys of parents, high school students and the public, and the summaries of the reviews of school jurisdiction plans and AERRs.

Appendix 2
Basic Education in Alberta – The Definition

Ministerial Order No. 004/98

A basic education must provide students with a solid core program including language arts, mathematics, science and social studies. Students will be able to meet the provincial graduation requirements and be prepared for entry into the workplace or post-secondary studies. Students will understand personal and community values and the rights and responsibilities of citizenship. Students will develop the capacity to pursue learning throughout their lives. Students also should have opportunities to learn languages other than English and to attain levels of proficiency and cultural awareness which will help to prepare them for participation in the global economy.

Student Learning Outcomes

Students are expected to develop the knowledge, skills and attitudes that will prepare them for life after high school. A basic education will allow students to:

- Read for information, understanding and enjoyment.
- Write and speak clearly, accurately and appropriately for the context.
- Use mathematics to solve problems in business, science and daily-life situations.
- Understand the physical world, ecology and the diversity of life.
- Understand the scientific method, the nature of science and technology, and their application to daily life.
- Know the history and geography of Canada and have a general understanding of world history and geography.
- Understand Canada's political, social, and economic systems within a global context.
- Respect the cultural diversity and common values of Canada.
- Demonstrate desirable personal characteristics such as respect, responsibility, fairness, honesty, caring, loyalty, and commitment to democratic ideals.
- Recognize the importance of personal well-being and appreciate how family and others contribute to that well-being.
- Know the basic requirements of an active, healthful lifestyle.
- Understand and appreciate literature, the arts and the creative process.
- Research an issue thoroughly and evaluate the credibility and reliability of information sources.
- Demonstrate critical and creative thinking skills in problem solving and decision making.
- Demonstrate competence in using information technologies.
- Know how to learn and work independently and as part of a team.

- Manage time and other resources needed to complete a task.
- Demonstrate initiative, leadership, flexibility, and persistence.
- Evaluate their own endeavours and continually strive to improve.
- Have the desire and realize the need for life-long learning.

Standards for Student Learning

The Minister of Education defines acceptable standards and standards of excellence for student achievement in consultation with Albertans. Employers are involved in specifying the knowledge, skills and attitudes needed in the workplace. Schools, school authorities and the Minister of Education assess and report regularly to the public on a range of student learning.

The school's primary responsibility is to ensure that students meet or exceed the provincial standards as reflected in the Student Learning Outcomes (outlined above), the Alberta Programs of Study, provincial achievement tests, diploma examinations and graduation requirements.

Education Delivery

Schools must engage students in a variety of activities that enable them to acquire the expected learnings. Schools have authority to deploy resources and may use any instructional technique acceptable to the community as long as the standards are achieved. Schools, teachers and students are encouraged to take advantage of various delivery options including the use of technology, distance learning and the workplace.

Schools play a supportive role to families and the community in helping students develop desirable personal characteristics and the ability to make ethical decisions. Schools also help students take increasing responsibility for their learning and behaviour, develop a sense of community belonging and acquire a clearer understanding of community values and how these relate to personal values.

Students learn basic, transferable knowledge, skills and attitudes in school. Schools, in co-operation with employers, provide opportunities for students to develop and practice employability skills. The Minister of Education provides credit for off-campus learning that is approved and accepted by the school and the employer. Government works with schools, employers and post-secondary institutions to help young people make a smooth transition to work and further study.

Appendix 3

Provincial Results for Measures for the Provincial Priority Areas for Improvement

Listed below are the results for the provincial performance measures related to the required provincial priority areas for improvement. The provincial achievement test results for grade 3 language arts and mathematics and the results for grade 9 mathematics are the **required** measures for the early literacy and numeracy and the secondary mathematics priorities respectively. The other measures are provided as examples. Charter school authorities identify appropriate measures for these other priorities in their three-year education plans. If the charter school's measures correspond to the provincial measures, their results can be reported in relation to provincial results in their plans and AERRs.

Priority: Improving early literacy and numeracy.

- Percentages of students who achieved the acceptable standard on the grade 3 provincial achievement tests in language arts and mathematics and the percentages who achieved the standard of excellence (**required**).

Grade 3 Language Arts	1997/98	1998/99	1999/00	2000/01
Those who wrote				
- Acceptable	86%	89%	91%	89%
- Excellence	15%	16%	19%	17%
Total Enrolment in Grade				
- Acceptable	80%	84%	84%	83%
- Excellence	14%	15%	18%	16%

Grade 3 Mathematics	1997/98	1998/99	1999/00	2000/01
Those who wrote				
- Acceptable	81%	85%	88%	88%
- Excellence	21%	25%	28%	25%
Total Enrolment in Grade				
- Acceptable	75%	80%	82%	82%
- Excellence	20%	24%	26%	24%

Priority: Improving coordination of services for children with special needs.

- Percentages of parents of children with severe special needs who are satisfied with services for their child.

1997/98	1998/99	1999/2000	2000/01
79%	78%	76%	76%

Priority: Improving learning through effective use of information and communication technology (new focus).

- Percentages of students and parents who report school helps improve students' computing skills.

	1994/95	1995/96	1996/97	1997/98	1998/99	1999/00	2000/01
Students	62%	65%	62%	64%	70%	69%	69%
Parents			--	67%	80%	79%	79%

Priority: Improving secondary student achievement in mathematics*.

- Percentages of students who achieved the acceptable standard on the Grade 9 provincial achievement test in mathematics and the percentages who achieved the standard of excellence (**required**).

Grade 9 Mathematics	1997/98	1998/99	1999/00	2000/01
Those who wrote				
- Acceptable	72%	72%	74%	75%
- Excellence	14%	15%	16%	18%
Total Enrolment in Grade				
- Acceptable	64%	64%	67%	66%
- Excellence	13%	14%	14%	16%

* With the phase-in of Pure Mathematics 30 and Applied Mathematics 30, comparable results for grade 12 students in prior years are not available.

Priority: Increasing high school completion rates.

- Percentages of students who completed high school within five years of entering Grade 10. *New methodology*

	Overall Provincial Completion Rate	Completion Rate for Private and Charter Schools Combined
1999/00	72%	70%

Note: comparable methodology is not available for each charter school.

Priority: Improving public satisfaction with education.

- Percentages of the public satisfied with the quality of education in schools.

1997/98	1998/99	1999/00	2000/01
70%	66%	68%	70%

Appendix 4
Performance Measurement

Performance measures in charter school authority plans and results reports provide information on achievement of outcomes on key aspects of the education system and the charter school's mandate. This information is an essential part of accountability that enables the charter school to:

- assess and report on progress, what's working well, what needs improvement
- determine priorities for improvement and set improvement targets
- make program and budget decisions to maintain good performance and improve performance in areas requiring improvement.

Measures typically provide quantifiable information on key aspects of education. This information is generated quantitatively through tests and data analysis or through qualitative means, such as observation, interviews, portfolio reviews. Whether quantitative or qualitative, measures demonstrate observable change. To be meaningful, measures information is obtained regularly (e.g., annually) and is normally expressed in percentages, ratios, or numbers in relation to a total.

Types of Performance Measures

- **Outcome measures:** provide information on progress toward desired results in key areas - effectiveness of programs, impacts on clients.
- **Intermediate outcome measures**: For some desired outcomes, results may not be known for several years. In such instances, it is useful to measure intermediate steps – milestones or landmarks - toward the desired outcome.

The measures in school authority plans and results reports focus on outcomes and constitute the core set for assessing and reporting on progress and achievement.

Other types of measures, listed below, are important for managing resources, providing programs and services and reporting contextual information:

- **Output measures**: information on number of clients served and types of services provided.
- **Process measures**: information on activity and efficiency. These measures indicate demand for services and cost per unit of providing service.
- **Input measures**: information on resources allocated to programs, such as funding, personnel, equipment. These measures provide information on cost of providing programs and services.

Characteristics of good performance measures

Good performance measures provide information that is:

- Understandable – clear and sufficient to provide an understanding of the organization or system to staff, community and government
- Valid – meaningful and credible (sound, defensible)
- Relevant and appropriate – timely, related to important aspects
- Reliable – unbiased, error free and verifiable
- Comparable – show change over time and/or among similar organizations
- Discrete – provides information in distinct, non-overlapping categories
- Empowering – useful for decision making, promote improvement
- Practical – can be reliably assessed with reasonable effort

References:

Alberta Treasury, *Measuring Performance: A Reference Guide*, September 1996. On the internet at http://www.treas.gov.ab.ca/publications/measuring/ .

Alberta Auditor General, *Government Accountability*, February, 1997. On the internet at http://www.oag.ab.ca/ . Click on the Reading Room.

Appendix 5
Setting Local Targets for Student Achievement

Targets and Planning

A target is a desired level of measurable or observable performance to be attained by a specified time. Targets are an implicit part of any goal. While a school authority's educational goals point out the directions for people's efforts, targets describe in specific terms what will be accomplished by a certain time. This allows staff to assess whether they are heading where they intended to go, and how well they are moving toward their desired outcomes. Assessment of progress in relation to a target may also lead to the recognition that a different target would be more helpful in guiding your school's efforts toward a particular goal. By identifying immediate, reachable outcomes, targets encourage teachers, students, administrators, and their community to believe that distant goals are attainable.

Viewed in this way, targets can be a valuable part of the school authority plan. Your mission, mandate, values and beliefs, and long-range goals all provide a context for setting specific targets. Similarly, past achievement levels are helpful indicators of what specific targets may be most appropriate. This is why achievement test and diploma examination results, as well as results of various other local assessments, are relevant in target setting.

Local Focus

Quantitative targets for student achievement on the provincial achievement tests are **required** in charter school three-year education plans.

Systematic interpretation of charter school results from provincial achievement tests will reveal where students need more help in order to continue learning successfully. This can be the beginning point for setting school targets for student performance on the tests for the next three years.

School targets should be realistic and achievable, based on past performance. It is possible that school targets would be different from provincial standards. Staff in each school will be able to identify what percentage of their students reasonably can be expected to achieve the provincial standard in a particular test within the time specified in the targets. An important part of this decision is agreeing on how financial and human resources can support the targets.

Tips for Setting Local Targets

- Consider past and desired participation rates in achievement tests.
- Prioritize to focus on areas needing improvement. For example, emphasize subjects needing improvement in student performance are across grades. It may be reasonable to set "hold the line" targets to maintain current levels of performance in other areas temporarily while directing attention to the selected areas.

- Set targets in relation to other targets. It is important to ensure that achievement of one target does not jeopardize the achievement of another. For example, student participation rates for achievement tests should not decrease because of a desire to improve school or authority results.
- Work collaboratively across grades in a school. Students' performance on an achievement test reflects their learning over the years. Teachers in all grades can contribute important insights and assistance in setting targets.
- Use the school reports on achievement test results to identify what aspects of a subject or course need attention, and use this information to plan targets.
- Emphasize what students need, in order to succeed, rather than focusing on problems that keep students from achieving at the levels expected provincially.
- Expect to set different targets in different grades and subjects/courses, depending on past results and current priorities and resources.
- Interpret targets to students and parents so that they are part of the school-wide effort to achieve targets.
- Report to students and parents on student achievement in relation to targets.

Targets in Perspective

Provincial tests, though providing a common standard and important information about students' learning, are only one of many measures for evaluating the effectiveness of schools and school authorities.

Charter school authorities may find it helpful to set targets for other indicators of student achievement, and for areas other than student achievement. Examples include:

- completion of programs
- satisfaction reported by students or parents
- involvement of parents or others from the community in schools
- student involvement in the community or in extra curricular activities.

These other targets can either be quantitative (e.g., "by 2003, 80% of students") or qualitative (e.g., "improve..." or "maintain...").

Through its targets, each school, together with parents and members of the community, can highlight priorities that exist locally for a given year and commit to achieving certain results.

Insofar as target setting complements other strategies for improving student learning, your targets are likely to contribute to student learning and to the overall effectiveness of schooling in your community.

Appendix 6
Conducting Surveys

Some local measures may require surveys of parents, students, staff and other community members.

To be manageable, surveys can be done on a random sampling basis or rotated among stakeholder groups over a three-year period.

If school authorities use the same questions as are used in Alberta Learning's annual surveys of a stratified random sample of parents, students and the public, results can be considered in relation to provincial results. The questions asked in the Ministry's surveys of students, parents and the public are available on the Internet at http://www.learning.gov.ab.ca/educationsystem/planning.asp.

While surveys do not have to be done annually, the latest available survey information should be reported in the AERR each year along with trend data (information on the same questions from surveys done in previous years), if available.

The Alberta Auditor General's Office has prepared a resource on conducting surveys for the Alberta public sector: *Client Satisfaction Surveys*, October 1998. This document is available on the internet http://www.oag.ab.ca. Click on "The Reading Room."

Two resources were prepared for the Ministry in 1995 to provide guidance to school authorities on conducting satisfaction surveys:

- Environics West, *Pilot Project Report:* This report compares two methods of conducting surveys of parents, teachers and students: telephone interviews and mailed, self-administered questionnaires. The report is available on the internet at http://www.learning.gov.ab.ca/educationsystem/satisfaction/PilotProjectReport.pdf.

- Environics West, *Interviewing Manual: Telephone Satisfaction Surveys.* This manual provides advice on selecting samples and conducting telephone surveys. It is available on the internet at http://www.learning.gov.ab.ca/educationsystem/satisfaction/Interviewing_Manual.pdf .

Appendix 7
Sample Measures for New Required Goal – Responsive and Responsible Authority/School

Outcome: The authority/school demonstrates leadership and continuous improvement in administrative and business processes and practices.

Continuous Improvement

- Percentage of parents, students and staff who are satisfied that their school or school authority has a process in place for school improvement; satisfaction that these processes are effective.
- Percentage of parents and the public who agree that schools/authority focuses on improvement activities.
- Percentage of employees, parents, senior executives, students and community stakeholders who are satisfied with improvements/changes implemented by the charter school board.
- Percentage of parents and the public who indicate in surveys that charter schools have improved, stayed the same or become worse in the last five years.
- Percentage of schools that complete self-evaluations and use the results for school improvement.
- Parent, teacher and public assessment that school boards have specific school improvement processes in place:
    - input from public, staff and other stakeholders is effectively incorporated in the development of the organization's plan.
    - the board has a sound process for determining strategic directions for the organization
    - the board takes an active role in the setting of expectations, such as goals and targets, as well as performance measures for the organization
    - the board has an explicit process for determining priorities for the organization
    - the board follows a process for establishing and reviewing on a regular basis the organization's policies
    - the board has processes in place to ensure that the educational delivery system provides adequate access to quality health services
    - the business plan submitted annually to the Ministry is consistent with provincial guidelines
        - the annual report submitted annually to the Ministry is complete, focuses on performance relative to the business plan, and explains variation
        - the board has been adequately involved in defining desired results and in determining the system for organization-wide monitoring and reporting
        - the board establishes the boundaries of acceptable performance on key measures and indicators, within available resources
        - the board has a formal process for reviewing organization-wide performance information.

Responsiveness to the Community

- Percentage of local community representatives on school boards who feel that boards have achieved their goals.
- Percentage of school staff, local community representatives and parents who are satisfied with their involvement in the development and implementation of school goals, objectives and priorities.
- Percentage of parents and the public who are satisfied with the level of information about overall student achievement, and with the actual level of student achievement in their school; in their school jurisdiction.
- Percentage of parents who are satisfied with the level of information received from the school about programs, services and practices.
- Percentage of parents and community stakeholders who are satisfied with access to useful information about the school's performance.
- Percent of the school board's public who are satisfied with access to information about the school system's performance in relation to student achievement and how money is spent.

Effective Communication

- Percentage of the board's public who are satisfied with the information given by board.
- Percentage of the public answering "Yes" when asked whether enough information is available to confidently assess the quality of education in the charter schools/authority.
- Percentage of the school board's publics satisfied with access to information about the board's/the school's performance, such as teacher competency, decisions and actions of school boards.
- Percentage of parents and the board's public who are satisfied with information received about how money is spent by the local charter school, and by the charter authority.

Effective and Facilitative Leadership

- Percentage of parents, school staff and community representatives who are satisfied with the leadership provided by the school leader (e.g. principal).
- Percentage of parents, the board's public and staff who are satisfied with the leadership of the school board.
- Percentage of parents, the board's public and staff who are satisfied with the direction established by the school board.
- Perceptions of parents, the board's public and staff (gathered through focus groups) that school board decisions effectively support teaching and learning.
- Percentage of local community representatives on school boards who are satisfied that boards have achieved their goals.
- Percentage of teachers, parents and community stakeholders who are satisfied with their involvement in decision-making at the school level, and at the school authority level.

- Percentage of parents and school staff who are satisfied with their involvement in the development and implementation of school goals, objectives and priorities.
- Percentage of school system employees, students, parents and community stakeholders who are satisfied with the charter school board's education plan and priorities.
- Percentage of school system employees, students, and parents satisfied with the Board's resource allocation policies, priorities and processes.
- Percentage of school-based administrators satisfied with delegated resource management responsibilities and decision-making authority.
- Percentage of charter school board directors, staff, administrators and parents satisfied with the Board's policy development, implementation, monitoring and revision processes.
- Public ratings of perceived performance of the Board (scale: very good, good, fair, poor, very poor) in four areas:
    - providing access to all students of a quality education,
    - effectively promoting quality education in Alberta schools
    - placing the main focus of education on the student
    - providing innovative and creative approaches to educational programming
- Public ratings of how well charter schools/authorities assist students in achieving various standards (scale: very good, good, fair, poor, very poor):\
    - a standard of values,
    - the ability to become a productive member of society,
    - a standard of student achievement,
    - a standard of emotional maturity.
- Perceptions of staff and stakeholders of the opportunities for active participation in making decisions.